



Filing ID #10021048

# FINANCIAL DISCLOSURE REPORT

---

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

---

## FILER INFORMATION

**Name:** Lena Rose Epstein  
**Status:** Congressional Candidate  
**State/District:** MI11

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/15/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allergan plc Ordinary Shares (AGN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Allstate Corporation (ALL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		
AMC Networks Inc. - Class A (AMCX) [ST]		\$1 - \$1,000	None		
Amerco (UHAL) [ST]		\$1,001 - \$15,000	None		
American Airlines Group, Inc. (AAL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
American Express Company (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
American International Group, Inc. New (AIG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Anadarko Petroleum Corporation (APC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Analog Devices, Inc. (ADI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Aon plc Class A Ordinary Shares (AON) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Applied Materials, Inc. (AMAT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Archer-Daniels-Midland Company (ADM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Autodesk, Inc. (ADSK) [ST]		\$1,001 - \$15,000	None		
AvalonBay Communities, Inc. (AVB) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Bank of America Corporation (BAC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Bank of New York Mellon Corporation (BK) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Bayer Aktiengesellschaft American Depositary Shares (BAYRY) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Berkshire Hathaway Inc. New (BRK.B) [ST]		\$1,001 - \$15,000	None		
Biogen Inc. (BIIB) [ST]		\$1,001 - \$15,000	None		
Blackrock Global Div Port Inst [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Boeing Company (BA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Boston Scientific Corporation (BSX) [ST]		\$1,001 - \$15,000	None		
Brighthouse Financial, Inc. (BHF) [ST]		\$1,001 - \$15,000	None		
Bristol-Myers Squibb Company (BMY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Broadcom Inc. (AVGO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Capital One Financial Corporation (COF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Carlisle Companies Incorporated (CSL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
CarMax Inc (KMX) [ST]		\$1,001 - \$15,000	None		
CBRE Group Inc Common Stock Class A (CBRE) [ST]		\$1,001 - \$15,000	None		
CBS Corporation Class B (CBS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
CenturyLink, Inc. (CTL) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Chevron Corporation (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Cisco Systems, Inc. (CSCO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Citigroup, Inc. (C) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Citrix Systems, Inc. (CTXS) [ST]		\$1,001 - \$15,000	None		
Comcast Corporation - Class A (CMCSA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ConocoPhillips (COP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Consolidated Edison, Inc. (ED) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Cree, Inc. (CREE) [ST]		\$1 - \$1,000	None		
CVS Health Corporation (CVS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Delta Air Lines, Inc. (DAL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Devon Energy Corporation (DVN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Discovery, Inc. - Series A (DISCA) [ST]		\$1 - \$1,000	None		
Dolby Laboratories (DLB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Dover Corporation (DOV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ensco plc Class A Ordinary Shares (ESV) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Entergy Corporation (ETR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Equity Residential Common Shares of Beneficial Interest (EQR) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Expedia Group, Inc. (EXPE) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Exxon Mobil Corporation (XOM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Facebook, Inc. - Class A (FB) [ST]		\$1,001 - \$15,000	None		
Fluor Corporation (FLR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Franklin Resources, Inc. (BEN) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Freeport-McMoRan, Inc. (FCX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
GCI Liberty, Inc. - Class A (GLIBA) [ST]		\$1 - \$1,000	None		
General Dynamics Corporation (GD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
General Electric Company (GE) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
General Motors Company (GM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs Group, Inc. (GS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs Grw Opport I [MF]		\$15,001 - \$50,000	None		
Halliburton Company (HAL) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Harley-Davidson, Inc. (HOG) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Hasbro, Inc. (HAS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
HCA Healthcare, Inc. (HCA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Henry Schein, Inc. (HSIC) [ST]		\$1,001 - \$15,000	None		
ImmunoGen, Inc. (IMGN) [ST]		\$1 - \$1,000	None		
Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
International Business Machines Corporation (IBM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Ionis Pharmaceuticals, Inc. (IONS) [ST]		\$1,001 - \$15,000	None		
J.M. Smucker Company (SJM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Jacobs Engineering Group Inc. (JEC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Johnson Controls International plc Ordinary Share (JCI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JPMorgan Mid Cap Value I [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
L3 Technologies, Inc. (LLL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Lear Corporation (LEA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Leucadia National Corporation (LUK) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Liberty Broadband Corporation - Class A (LBRDA) [ST]		\$1 - \$1,000	None		
Liberty Broadband Corporation - Class C (LBRDK) [ST]		\$1 - \$1,000	None		
Liberty Media Corporation - Series A Liberty Formula One (FWONA) [ST]		\$1 - \$1,000	None		
Liberty Media Corporation - Series A Liberty SiriusXM (LSXMA) [ST]		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Liberty Media Corporation - Series C Liberty Formula One (FWONK) [ST]		\$1 - \$1,000	None		
Liberty Media Corporation - Series C Liberty SiriusXM (LSXMK) [ST]		\$1 - \$1,000	None		
Lions Gate Entertainment Corporation Class B Non-Voting Shares (LGF.B) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
LogMein, Inc. (LOGM) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Marathon Oil Corporation (MRO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Mastercard Incorporated (MA) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
McKesson Corporation (MCK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Medtronic plc. Ordinary Shares (MDT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
MetLife, Inc. (MET) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Naspers Limited N Shs Sponsored American Depositary Receipt Representing Class N Shares (NPSNY) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
National Oilwell Varco, Inc. (NOV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Newell Brands Inc. (NWL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
NOW Inc. (DNOW) [ST]		\$1 - \$1,000	None		
Nuance Communications, Inc. (NUAN) [ST]		\$1 - \$1,000	None		
Nucor Corporation (NUE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Occidental Petroleum Corporation (OXY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Pentair plc. Ordinary Share (PNR) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PPG Industries, Inc. (PPG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Quanta Services, Inc. (PWR) [ST]		\$1,001 - \$15,000	None		
Qurate Retail, Inc. - Series A QVC Group (QRTEA) [ST]		\$1,001 - \$15,000	None		
Robert Half International Inc. (RHI) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
RPM International Inc. (RPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Seagate Technology PLC - Ordinary Shares (STX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Selkirk [PS] DESCRIPTION: Vacant land - Detroit, MI		\$1 - \$1,000	None		
Snap-On Incorporated (SNA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
State Street Corporation (STT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Twitter, Inc. (TWTR) [ST]		\$1,001 - \$15,000	None		
United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Valmont Industries, Inc. (VMI) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard FTSE All World Ex US ETF (VEU) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Vertex Pharmaceuticals Incorporated (VRTX) [ST]		\$1,001 - \$15,000	None		
Vesco Oil Co [PS] DESCRIPTION: Vesco Oil Co		\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vesco Oil Employer 401(k) plan ⇒ Columbia Dividend Income Fd [MF]		\$50,001 - \$100,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Franklin Total Return A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Hotchkis and Wiley Small Cap Val A [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Janus Henderson Enterprise [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ MFS Growth A [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ MFS International Value A [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Oak Ridge Small Cap Growth Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Oppenheimer International Growth A [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Victory Sycamore Established Value A [MF]		\$15,001 - \$50,000	Tax-Deferred		
Visible Solutions [PS]		\$15,001 - \$50,000	Royalties from IP	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: Visible Solutions					
Walgreens Boots Alliance, Inc. (WBA) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Weatherford International plc (WFT) [ST]		\$1,001 - \$15,000	None		
Wells Fargo & Company (WFC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Western Ast Int Term Muni I [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000



Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Western Digital Corporation (WDC) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Whirlpool Corporation (WHR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Vesco Oil Co	Salary	\$88,000.00	\$235,000.00
Heaven Hill Distilleries	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Detroit Historical Society
Director	Community Foundation of South East Michigan
Director	Detroit Historical Society
Director	Detroit Regional Chamber of Commerce
Director	Jewish Community Center
Director	Kadima

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2018	Lena Epstein and Vesco Oil Co 401(k) Plan	Continuing participation in Vesco Oil Co 401(k) Plan

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Vesco Oil Employer 401(k) plan

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Lena Rose Epstein , 05/15/2018